



HOPWA IDIS Data Clean-up

Office of Community Planning and Development
U.S. Department of Housing and Urban Development

Status of Data Clean-up

The office is now in its second phase of data clean-up which includes analyzing the 2000 and 2001 baseline data. This analysis will review current IDIS activities to determine the report period they represent and include a review of activities against the data clean-up goals. Currently, the Data Clean-up Team is working with HOPWA formula grantees in identifying IDIS activities that represent accomplishments during the 2000 and 2001 program year. Expected completion of this initial analysis is April 2002. After designating the 2000 and 2001 reporting year activities, the Data Clean-up team will begin the analysis of accomplishment data reported on the MA04 screen and the HOPWA accomplishment screens.

Baseline Data:

In an effort to collect, utilize, and monitor year-end data in IDIS, the Office of HIV/AIDS Housing, CPD has developed a set of standard baseline reports to represent the year-end activities for the 2000 and 2001 program years. The reported project and activities should correspond with the grantee CAPER report and illustrate actual accomplishments during the program year. In determining the projects and activities associated with the report, HUD used the following criteria:

- Underway Activity: Activities with the status code of "underway" were included, since they were active within IDIS and thus active during the current program year.
- Completed Activity: Activities with a status code of "complete" and a complete date within the 2000/2001 program year or within 90 days after the end of the program year are included within the baseline of activities.

In reviewing the reports, grantees may determine that some activities are representative of prior program years or represent the next program year. Grantees are requested to notify the HOPWA technical assistance provider, CSC, Inc. of any activities that should be removed from the 2000 baseline activities. Grantees may call or email their information to Vera Perez, CSC, Inc., at Vera_A._Perez@hud.gov or (202) 708-0614 x4786. In addition, staff from CSC, Inc. will be contacting grantee staff to clarify 2000 project activities and to continue IDIS data clean up.

IDIS Standard Reports

The standard reports provide general information on grantee projects and activities through the IDIS common path screens and information on grantee accomplishments reported through the HOPWA path screens. The standard reports may be downloaded at <http://www.hud.gov/offices/cpd/aidshousing/granteeguidance/formula/reports/index.cfm>. The reports are updated on a quarterly basis.

Common Path Reports

The following reports summarize general information on the IDIS projects and associated activities including obligated and disbursed amounts, activity status, and proposed and actual accomplishments, as entered on the MA04 screen.

- Summary of Baseline Activities by Year and Grantee
- Summary of HOPWA Activities Report by Year

HOPWA Accomplishment Path Reports

The following reports summarize accomplishment data reported through the HOPWA accomplishment path screens in IDIS for all baseline activities identified as 2000 program year activities. The reports summarize accomplishments for the identified grantee.

- Housing Assistance Report
- Supportive Service Report
- Program Expenditure Report
- Program Beneficiary Summary Report

Data Clean-up Goals and Criteria

The Office of HIV/AIDS Housing has established the following expectations and goals for use of IDIS for HOPWA grantees.

Expectations:

- 1) All HOPWA entitlement grantees (108 for FY2002) will actively use IDIS for financial and accomplishment reporting.
- 2) HOPWA grantees will utilize the HOPWA identified matrix codes.
- 3) HOPWA grantees will report proposed accomplishments on the MA04 screen for all active activities at activity set-up. An MA04 screen should be created for the current reporting year.
- 4) HOPWA grantees will report accomplishment data either 1) at the completion of an activity, or 2) within 90 days of the end of the operating year (program year). Accomplishment data shall include the entry of actual accomplishments on the MA04 screen and the annual accomplishments by activity in the HOPWA path screens.

Goal 1:

Accurate, efficient, and reliable use of the IDIS by all formula grantees.

To ensure the reliability of HOPWA IDIS data the Office of HIV/AIDS Housing has established the following objectives:

Objective: Accurate use of HOPWA matrix codes.

All HOPWA entitlement areas are required to use the matrix codes identified by the HUD's Office of HIV/AIDS Housing. Currently, HOPWA grantees should be utilizing the 31 series of matrix codes.

Objective: Identify all projects and activities associated with a grantee by reporting year. Identify for each grantee the project and their associated activities and their funding history (i.e total obligated amounts, total disbursed, total remaining) to ensure the accurate set-up of HOPWA projects and activities. IDIS activities will be tied to a specific reporting year.

Objective: Completion of baseline HOPWA/IDIS data for the current operating year for all grantees.

The baseline IDIS data will consist of all projects and activities in an active status or completed during the report year (i.e. status code - underway or completed). Active activities will be tracked by HUD for each grantee for the reporting of accomplishment data. Activities should be reported as the active activities for the current operating year. HUD will track these activities throughout the years for proposed and actual accomplishments and for annual accomplishment reporting through the HOPWA screens in IDIS.

Expectations:

- HUD will track baseline data for edits or changes for reporting accomplishment data. (i.e. activity status code changes or accomplishment data entered).
- Baseline data will provide a starting point for accomplishment reporting. All grantees will begin at the same time for reporting purposes. (i.e. All baseline data will be for the current reporting period).
- Grantees which are unable to report past accomplishments through the system will be asked to report accomplishment data through the standard HOPWA APR format.

The following goals should be met through the baseline data identified in the above objective.

Goal 2:

IDIS shall provide an account of the annual number of proposed and actual accomplishments for each grantee for BOP reporting.

Objective: HOPWA annual number of proposed and actual accomplishment data for each formula grantees will be determined through analysis of IDIS data.

IDIS shall provide proposed and actual accomplishment data by project and associated activities for each HOPWA grantee. From information provided on the MA04 screen proposed and actual accomplishments should be reported to HUD, per guidance issued by the Office of HIV/AIDS Housing.

Objective: HOPWA annual HUD APP number of proposed and actual units of housing supported for each formula grantees will be determined through analysis of IDIS data. IDIS shall provide proposed and actual accomplishment data by project and associated activities for each HOPWA grantee. From information provided on the MA04 screen for

all active housing related activities the proposed and actual units of housing should be reported and tracked by HUD for each year.

Goal 3:

IDIS shall provide an account of annual accomplishment data to track the performance of HOPWA grantees in utilizing HOPWA funds.

Objective: IDIS shall provide annual accomplishment data by project and activity for each operating year.

In an HOPWA Annual Progress Report format, IDIS shall provide accomplishment data for each grantee by project and associated activities. Accomplishment data should include information on each project sponsor and report on total expenditures, activity expenditures, persons served, units of housing supported, demographic information, housing information, and supportive services information. The report should include a list of the number and title of each activity, which served as the source data for the report. All data elements with the HOPWA APR should be included.

Objective: IDIS shall provide annual accomplishment data by grantee for each operating year.

In an HOPWA Annual Progress Report format, IDIS shall provide accomplishment data for each grantee. Accomplishment data should include information on the sum total of all grantee projects and activities conducted by project sponsors reporting total expenditures, activity expenditures, persons served, units of housing supported, demographic information, housing information, and supportive services information. The report should include a list of the number and title of each activity, which served as the source data for the report. All data elements with the HOPWA APR should be included.

Additional Resources:

HOPWA Annual Progress Report (HUD-40110-C) (11/97)

HOPWA Formula Grantees Annual Reporting (CAPER)